

LEADERSlink tutorials:

SUBMITTING ISSUES/SUGGESTIONS

Please reach out to Tate Krumwiede at 303-797-9080 x125 to request support staff access.

Log in to LEADERSlink

Navigate to the **Home Office Requests** tab:

LeadersLink

Bill Advisor

LEADERSlink

Search...

Home Dashboards Payout Accounts **Home Office Requests** Compliance Approvals Books & Records Docs

LeadersLink Resources

- Advizr
- RightBridge
- Training Videos
- Starlight Portfolios
- FINRA Manual

Create New...

Shortcut

- Calendar

Recent Items

- John Test
- BRD-3325
- Test Business
- Household
- Test Household
- Test

Messages and Alerts

Dashboard Refresh

As of 10/10/2017 2:24 PM. Displaying data as Bill Advisor.

Compensation Overview

Beginning Balance:	\$0
Change Since Last Payout:	\$0
Gross Commission Payable:	\$0
Less Amount On Hold:	\$0
Net Commission Payable:	\$0

Compensation Activity

Current Week (Net):	\$0
Previous Week (Net):	\$0
Month-to-Date (Net):	\$0
Quarter-to-Date (Net):	\$0
Year-to-Date (Net):	\$0

Hold/Suspense Report

Client	Hold Reason	Sum of Commission Payable
Total	-	0.00

My Tasks New All Open

You have no open tasks scheduled for this period.

Calendar New Event

Today 10/13/2017

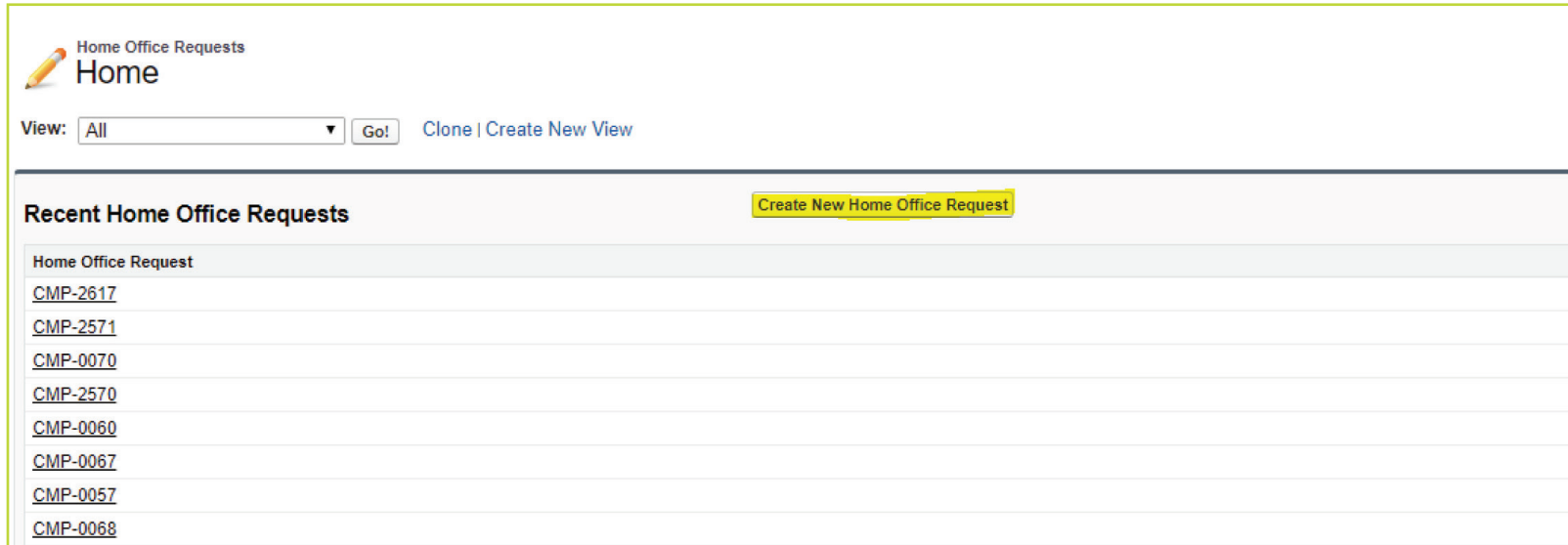
You have no events scheduled for the next 7 days.

October 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04

1 7 31

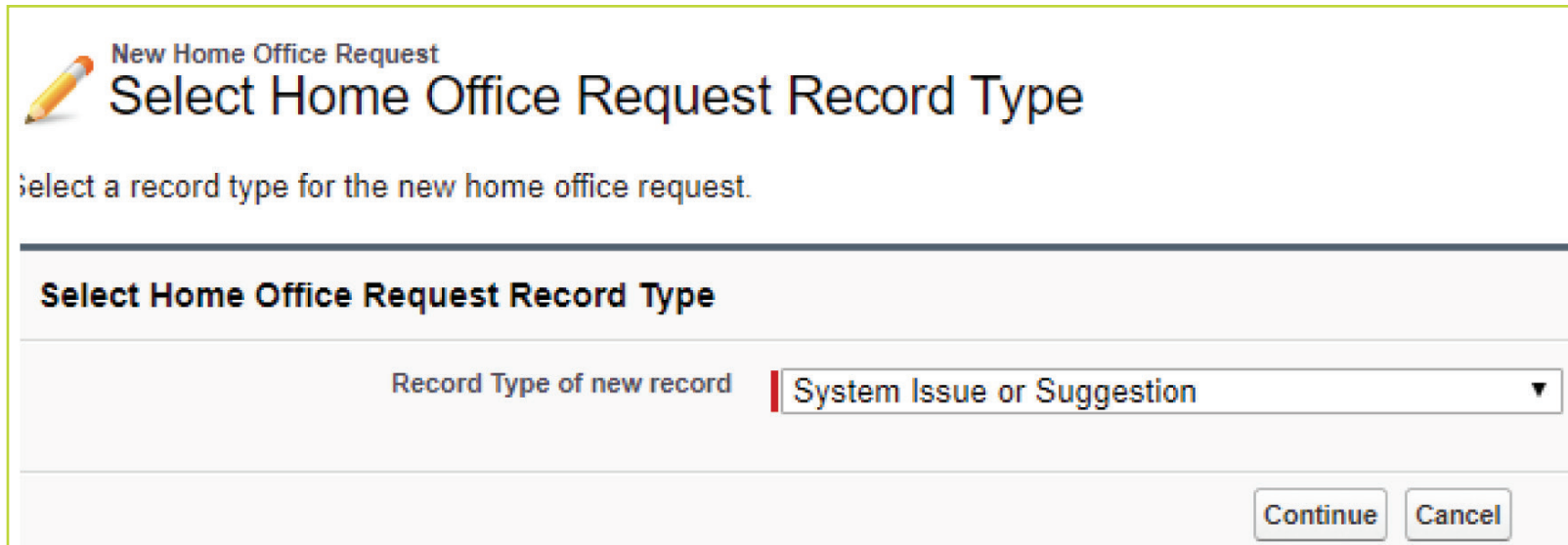
Once on the **Home Office Requests** tab, click **Create New Home Office Request**:



The screenshot shows the 'Home Office Requests' page. At the top left, there is a pencil icon and the text 'Home Office Requests' and 'Home'. Below this, there is a 'View:' dropdown menu set to 'All', a 'Go!' button, and links for 'Clone' and 'Create New View'. The main section is titled 'Recent Home Office Requests' and contains a table with a header 'Home Office Request' and ten rows of request IDs: CMP-2617, CMP-2571, CMP-0070, CMP-2570, CMP-0060, CMP-0067, CMP-0057, and CMP-0068. A yellow button labeled 'Create New Home Office Request' is located in the top right corner of the table area.

Home Office Request
CMP-2617
CMP-2571
CMP-0070
CMP-2570
CMP-0060
CMP-0067
CMP-0057
CMP-0068

Select **System Issue or Suggestion**.



The screenshot shows the 'New Home Office Request' form. At the top left, there is a pencil icon and the text 'New Home Office Request'. The main heading is 'Select Home Office Request Record Type'. Below this, there is a text prompt: 'Select a record type for the new home office request.' The form has a section titled 'Select Home Office Request Record Type' which contains a label 'Record Type of new record' and a dropdown menu with 'System Issue or Suggestion' selected. At the bottom right, there are 'Continue' and 'Cancel' buttons.

Record Type of new record | System Issue or Suggestion ▼

Continue Cancel

Click **Continue**.

The following will appear on your screen, complete the necessary fields. Please keep in mind any fields marked with a red bar are required and must be completed in order to proceed to the next step.

Home Office Request Edit		Save	Save & New	Cancel
Information				
Advisor	<input type="text"/>			
		Record Type	LeadersLink Suggestion	
LeadersLink Suggestion				
Area for Suggestion	--None--			
Suggestion Description	<div></div>			
		Save	Save & New	Cancel

Once the fields are filled out, click **Save**.

Once all the information is filled out completely and correctly, click **Submit for Approval**.

Once submitted this will give you an email confirmation, but there's not an actual approval process. This will be submitted to our management team for review and will be prioritized for potential implementation.

If you have any questions, please email support@leadersgroup.net.